Direct ISA inherited allowance account application for an attorney, receiver or deputy

- Please note that you can only apply for a Direct ISA inherited allowance account if the holder is the surviving spouse or civil partner.
- Before we accept an application, we may make electronic checks on the identity and address of the holder and the attorney, receiver or deputy. We may also ask for documentary evidence.
- Do not send any money with your initial application. We can't accept deposits until we have opened the account. Before we open the account, we will contact the manager(s) of the deceased's ISA(s) for further information, including confirmation that none of the inherited allowance has already been used.
- We require the holder to sign in conjuction with the attorney, receiver or deputy, unless there is a physical or mental incapacity. You also need to enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy, if you have not already registered one with us that covers you applying for and managing this account.

You also need to send the holder's original certificate of marriage or civil partnership, or a certified copy.

Please see the end of the form for who can certify a copy and how to do so.

- Where an appointed attorney, receiver or deputy has restricted authority or must act jointly for all transactions with another appointed individual, the NS&I Direct ISA inherited allowance account cannot be managed online or by phone. In this case all communications and transactions will be by post only
- Please write in BLACK CAPITAL LETTERS inside the boxes. This helps us process the form faster.

1	Account holder's NS&I number details	NS&I IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
	Please complete in full. title	date of birth (DD MM YYYY) Image: Constraint of the second seco
	surname	
	forenames in full	
	address	
	postcode	country of residence
	nationality	
		Does the holder have a National Insurance number? yes no
	National Insurance number	If yes, you must write the number here.
2	Deceased's title	date of birth (DD MM YYYY)
	surname	
	forenames in full	
	address at date of death	
	postcode	date of marriage/civil partnership (DD MM YYYY)
	date of death (DD MM YYYY)	National Insurance number

Please complete all pages **>**

3	Details of the deceased's	name of ISA provider	
	ISA(s)	provider's address if not NS&I	
	If the holder's spouse or civil	II HOL NGAI	
	partner had more than one	ISA account	
	ISA, please list all those from	number name of ISA	
	which you want to use the holder's	provider	
	inherited allowance with NS&I.	provider's address if not NS&I	
		ISA account number	
		 name of ISA provider	
		provider's address if not NS&I	
		11 1101 11301	
		ISA account	
		number 	
		provider	
		provider's address if not NS&I	
		ISA account number	
		name of ISA provider	
		provider's address if not NS&I	
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		ISA account number	
		 name of ISA provider	
		provider's address if not NS&I	
		ii not nodi	
		ISA account	
		number	

4	Attorney/receive deputy's details	er/ NS&I number	NS&I If you as the attorney, receiver or number, please write it here.												r or deputy have an NS&I																	
	Please complete in a If there is more than one																		late MN													
	attorney, please provide their details on a separa	surname																														
	sheet of paper. We will send all correspondence	forenames]
	to the person named he	re. address																														
		postcode												ntry iden																		
]														
		Preferably a mobile so we can reach you more easily.																														
]	
5	Nominated bank or building	(&I Direct Saver, just write 'NS&I' in the 'bank/building society' field, complete the 'name in which and write the account number in the 'bank reference or building society roll no' field.															ich a	ດດາ	unt									
	society account	bank/building	П					Т	Т										Τ													1
	details We need these details	society name in which account is held]
	before we can accept the application.	account number							Τ											1	s	ort co	de] _] _]
	Any withdrawals will be paid directly into this account. It must be an	bank reference or building							Τ]				-						-
	attorney, receiver or depu held in the UK, which is able to receive payments by electronic transfer.																															
6	Attorney/receive deputy's signature(s) We require the holder to sign in conjunction with the attorney, receiver or deputy, unless there is a physical or matching is a constitu	er/	 I I I 	firm am was he d ny s will he a	tha livi ece subs ma dmi	it: surv ng v asec scrip ke a nisti	vith l's d tion ny s ratic	the eath s I n ubso on of	dece i; nake cript f the	wi ion: est	ed v II b s w tate	with e ur rithir e.	iin th ider ii thr	ie m the p ee ye	eani orov ears	ing c isior of tl	ns of he d	ctior regu ate o	ulation of de	on 51 ath,	DDA or if	Incor of th later	ie IS, ; 18(A reg) day	gulat rs of	ions the	; com	pleti				
	mental incapacity.	attorney/receiver/ deputy's signature]]]
		second attorney/ receiver/deputy's																					1	d 1	ate (DD	MM T	YYY	Y)			٦
		signature (if applicable)																						 				L YYY	<u> </u>			
		holder's signature]]]
		Your marketing preferences We may contact you occasionally to promote other NS&I accounts and investments that you might be interested in. If you don't want us to do this, mark the box(es) below:																														
	attorn	ey/receiver/deputy	by po	ost				by	pho	one				b	y en	nail				onli	ne]									
	second attorn	ey/receiver/deputy (if applicable)	by po	ost				by	pho	one				b	y en	nail				onli	ne											
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Please enclose the holder's original certificate of marriage or civil partnership, or a certified copy. Also enclose the original power of attorney or confirmation of your appointment as receiver or deputy, or a certified copy, unless you have already registered one with us that covers you applying for and managing this account. See below about sending certified copies.

Thank you

Sending certified copies

If you are sending copies of the certificate of marriage, civil partnership, power of attorney, or a copy of the confirmation of your appointment as receiver or deputy, they must be certified as being a true copy of the original.

Who can certify the copy

If it's a copy of the power of attorney, choose one of the following people to certify it: the donor (if they still have capacity); a solicitor; a notary public or, unless it is a lasting power of attorney, a stockbroker.

If it's a copy of the certificate of marriage, civil partnership or confirmation of your appointment as receiver or deputy choose one of the following people to certify it: a qualified individual who is currently practising in the legal, financial or teaching profession; a doctor or dentist; a minister of a recognised religion; a civil servant or a prison, police or customs officer.

The person you choose to certify the copy must not be related to you by birth or marriage, in a personal relationship with you or live at the same address.

How to certify the copy

Ask your chosen certifier to write on the copied document:

"I certify that this is a true copy of the original (type of document) belonging to (name)."

Then ask them to sign and date the copied document, clearly print their full name, indicate their occupation or the capacity in which they are providing the certification (eg lawyer, doctor or teacher), provide their work address and daytime telephone number and affix any relevant official stamp where available. Members of professions should also give their institute membership number, if possible.